Person / Case Merge FAQ

Frequently Asked Questions regarding the merge of people and cases in eWiSACWIS

Is there a suggested Policy for Merging People / Cases?

- Designate 1 or 2 people in a county to do person and case merges. This seems to work well if the designated workers are clerical/support staff.

- Workers can send requests for case and person merges to the designated worker(s) using a form already created or any method determined by the county.

How do I determine which person record to keep and which to merge?

- Keep the person record with the most complete and accurate information.

- If one person record has a placement history and the other one does not, keep the person record with the placement history.

Who is Responsible for Merging the Person/Case Records?

- If both cases are open, call the other county and work it out. Most likely, it will make sense to keep the case that is the oldest and has the most case history. The county that created the duplicate case should probably be the county responsible for doing the person and case merges.

Who is Responsible for Merging the Person/Case Records?

- <u>If one of the cases is closed</u>, the closed case will need to be re-opened in order to merge the cases. Create a Services Intake, select the Services Intake type of “Re-Open to Merge Case” and make sure you search and select at least one participant from the closed case. The best way to ensure this is to verify the person ID. Screen In and link the Service Intake to the closed case. This will re-open the case. Once you have re-opened the case, your county should be responsible for merging the duplicate cases.

Who is Responsible for Merging the Person/Case Records?

- If there are duplicate CPS Family cases and one of the cases was created by State Adoptions, the county CPS Family case should be the one that is kept. State adoptions only created the CPS Family case as a placeholder for their workflow until all counties began using eWiSACWIS. After June 2004, State Adoptions will no longer have a need to create the basic CPS Family cases.

Who is Responsible for Merging the Person/Case Records?

- If there are duplicate Pre-Adoptive Child cases and one of the cases was created by State Adoptions, the State Adoption Pre-Adoptive Child case should be the one that should be used. The State Adoptions case should have the most accurate placement and the information needed for TPR/Adoption federal reporting. The duplicate person records for the TPR child should be merged but the child ID from the State Adoption Pre-Adoptive Child case should be retained. However, Pre-Adoptive Child cases cannot be merged so it will be necessary to close the county created Pre-Adoptive Child case with the value of "Other". The county should be responsible for closing their duplicate case.

How Do I Request Case Merge?

- Click on the hyperlink for the name of the case. This will open the Maintain Case page.
- Click on the Closing History Tab.
- In the Options drop down select the option of “Close Case”. Click “Go.”
- Select the value of “Merge” in the Reason drop down. A merge hyperlink will appear next to the Reason field. Click on the link to search for the case you want to **RETAIN.** Select the case and click the Continue Button. When you return to the Case Closure page you will see the case in the Retain Case group box.
- Click Save. The Case Closure Batch will run that night.
- The following day, return to the Case Closure page. If the Closure Status is “Closure Accepted”, approve the case merge and send it to your supervisor for their approval. If the Closure Status is “Closure Denied”, check the Case Closure Report to see what is preventing the case merge. It will not be necessary to request the merge again as the system will automatically process the request once the error has been corrected.

What are some of the reasons a merge will fail?

- If you have duplicate person records and duplicate cases it is necessary to merge the duplicate people prior to merging the duplicate cases. You can wait one day for the person merge to run, then request case closure for reason of merge the next day. If you request the person and case merge on the same day, the case merge will most likely not work the first night, but should go through automatically the next night.
- The Reference Person must be the exact same in both of the cases prior to merging. Be sure to check Person ID and not just their names.
- Check the Case Closure report for a complete listing of the reasons the merge has failed.

What if there are 3 (or more) duplicate people?

- Select <u>one </u>person record to keep for each duplicate case participant. Request the person merge for the duplicates into the one person record to be kept. For example: Person A, Person B and Person C are all duplicates. You want to keep Person A. Request to keep Person A and remove Person B and then request to keep Person A and remove Person C. Select which case record to keep and then close the duplicate cases for reason of merge.

What if there are overlapping placement dates for duplicate children?

- If there are duplicate children with overlapping placement dates, they cannot be merged. However, the duplicate cases can still be merged, but the child will appear twice (one for each person record). After the case merge, keep the child with the most accurate and complete history, then De-Activate the duplicate child record for reason of “Other”. This is to indicate which child to continue creating new work for (i.e. placements, permanency plans, etc.). The relationship can also be set to “Other” or “Unknown” to further indicate that this is a duplicate child no longer active in this case